

Iowa WIC Focus Training Cheat Sheet

The following modules were created for use by the Colorado WIC Program. Please be aware that several differences exist between state WIC programs' policies, procedures, and data systems. Below are notes to help you identify these differences as you begin to navigate Focus and the Iowa WIC Program. Please review these notes before completing the modules.

Welcome to Colorado WIC

CO.TRAIN Course ID: 1054510 Effective 1/5/2018, this course will no longer be available.

- ☐ In the state of Iowa, approximately 62,500 people received WIC last month.
- ☐ Similarly to Colorado, about 25% of WIC participants in Iowa are women, 25% are infants, and 50% are children.
- ☐ On average, WIC participants redeemed \$3.3 million dollars of WIC food benefits monthly.
- ☐ There are approximately 580 authorized WIC vendors throughout Iowa.
- ☐ There are 20 local agencies and 150 WIC clinics in Iowa.
- ☐ Personnel titles vary between Colorado and Iowa. Some descriptors you are likely to hear in your agency include:
 - ☐ WIC Coordinator
 - ☐ Competent Professional Authority (CPA)
 - ☐ Nutrition Educator
 - ☐ Support Staff
 - ☐ Breastfeeding Peer Counselor
 - ☐ Breastfeeding Coordinator
 - ☐ Nutrition Coordinator
 - ☐ Breastfeeding Peer Counselor Coordinator
 - ☐ Vendor Liaison
 - ☐ Outreach Worker
 - ☐ Data Coordinator
 - ☐ For more information on all these roles, please see policy 310
- ☐ Iowa WIC Resources
 - ☐ Staff
 - ☐ Iowa Policy and Procedure Manual
 - ☐ New Employee Training and Core Trainings
 - ☐ Molly Kellogg
 - ☐ Iowa WIC Formula Guide
 - ☐ Risk and Critical Thinking Guide
 - ☐ Friday Facts
 - ☐ Participants
 - ☐ Nutrition Education Handouts
 - ☐ WIChealth.org

- ❑ WIC Shopper App

Determining Participant Eligibility

CO.TRAIN Course ID: 1054775

- ❑ Colorado and Iowa use the same information system, however it does contain some state specific specifications. In Iowa, we call this system Focus. Compass refers to the system used in Colorado.
- ❑ Between states, what is considered acceptable proofs of ID, income, and residency for WIC may vary.
 - ❑ Some notable differences between the training module and Iowa policy:
 - ❑ In Iowa, baby's hospital footprint record, application for a birth certificate, and staff recognition are not acceptable forms of identification. We do, however, consider a Matricular Consular card to be an appropriate ID.
 - ❑ In Iowa, bank/credit card statements, personal checks, pay stubs, and W2s are not acceptable proofs of income. The Matricular Consular card cannot be used to satisfy address requirements.
 - ❑ In Iowa, bank statements are not considered an allowable proof of income.
 - ❑ For a list of acceptable proofs in Iowa, please refer to the following policies
 - ❑ 215.42 (adjunctive eligibility)
 - ❑ 215.45 (income)
 - ❑ 215.50 (address)
 - ❑ 220.10 (identification)

Introduction to Clinic Services and Searches

CO. TRAIN Course ID: 1054902

- ❑ All information in this training section applicable to Iowa
- ❑ How to Perform a Simple Search
 - ❑ In Iowa, you can look up a participant in the simple search by their Family ID, Person ID, Old Participant ID, PAN, FMNP Check Number, or Economic Unit Number.
- ❑ How to Perform an Advanced Search
- ❑ How to Use Statewide Sketch
 - ❑ You are unable to access a family record while statewide sketch is selected. This is a quick way to view certification end dates, FB issuance information, and PAN.
 - ❑ If a LA ID or Clinic ID are selected, the statewide sketch only shows participants who meet those specifications.
- ❑ How to Use Toolbars, Menus, and Functions

Intake Overview & Processing Standards

CO. TRAIN Course ID: 1057161

- ❑ In Iowa, pregnant women, breastfeeding women, infants less than six months old, and migrant farm workers must be offered a certification appointment within 10 days of their initial contact with the clinic (policy 215.20).
- ❑ When creating a proxy record, be sure to retain a proxy card or handwritten note signed by the parent/guardian. This information can be retained within the Focus system. Update proxy information at each certification appointment (policy 225.70).
- ❑ The information required to be added to the Family Data section in Focus appears in red. This includes Mother's Education Level, Printouts Language, and Referred To WIC By fields.

Help Desk & Network Down Time

CO. TRAIN Course ID: 1057163

- ❑ Contact Information for the Iowa WIC Helpdesk:
 - ❑ Phone: 1-800-532-1579
 - ❑ Email: wichd@idph.iowa.gov
- ❑ You should not be working in Network Down Time!

WIC Appointment Types and Basic Scheduler

CO. TRAIN Course ID: 1057164

- ❑ A mid-certification in Iowa is referred to as a Health Update. See policy 215.75 more information on the different health update requirements for infants, children, and breastfeeding women.
- ❑ Nutrition education contacts in Iowa are not specifically scheduled as low risk or high risk follow-ups. However, it is important that high risk participants are scheduled for at least one education contact with a licensed dietitian and have a nutrition care plan. See policies 215.62 and 240.30 for more information.
- ❑ Each agency sets up their own master schedule.
 - ❑ The state of Iowa does not have "Golden Rules of Scheduling." Appointment times on the scheduler will vary depending on the clinic.
 - ❑ Staff with System Administration rights can change the length of time automatically assigned to an appointment type in Focus.

Certification of a Pregnant Woman

CO. TRAIN Course ID: 1057165

- ❑ On the Identity screen, it is not a requirement to document Other Program Participation. However, your local agency may use this information to help determine what other resources families require.
- ❑ Remember that the acceptable proofs in the training and what is allowable in Iowa may vary. Eg, a bank statement cannot be used as proof of address in Iowa.
- ❑ In Iowa, Medicaid and SNAP are not documented in the Income Determination box. FIP would be reported here.

- ☐ The person who determines income eligibility can not be the same person who conducts the nutrition interview and completes the certification section. More information about this division of responsibility can be found in 225.50.
- ☐ At this time, please disregard the smoking box located on the Blood Screen.
- ☐ Focus does not have an Abnormal Blood Work Notice available as a print out. When you screen a pregnant woman with possible anemia or polycythemia, it is required that a referral be sent to her physician. A release of information or Women's Health History card could be used. See policy 245.60 for more information.
- ☐ Be aware that the names of the available risks and nutrition education topics in Colorado's training may be different than what they are called in Iowa's Focus System.
- ☐ An eWIC card cannot be assigned to a family unless at least one family member has an active status.

Recertification of a Child

CO. TRAIN Course ID: 1057166

- ☐ This scenario is a provisional certification.
 - ☐ When the missing proof is *residency*, do not create a new record. You may update the physical address if there has been a change in address.
 - ☐ When the missing proof is *income*, do create a new record, but leave the proof field blank.
- ☐ Just like the last course, the person completing intake and the person completing the nutrition interview and determining eligibility cannot be the same.
- ☐ Not performing a blood test because of mother's preference should not be done routinely. For more information about blood tests and when to complete these, see policy 215.72.
- ☐ Asking a parent if WIC information can be shared with the child's doctor, and selecting "Yes" in the Nutrition Interview does not take the place of a signed release of information. This radio button is for information only and is not required.
- ☐ Model food package in Focus will have different names than what you see in the training. For more information on child food packages, see policy 235.06.

eWIC Benefit Issuance in Compass

CO. TRAIN Course ID: 1062145

- ☐ Printing the food benefit list using the "Print Balance" button in the audit trail is not recommended. This will show food categories and subcategories which can be confusing for families. Instead, to reprint a food list, select "Print Family Food Benefits" from the Card Activities drop down at the top of your screen.
- ☐ Focus will not allow you to assign a PAN to a family until at least one participant has an Active status.
- ☐ If a replacement card is provided, benefits do not need to be reissued. Any benefits the family had on the old card will automatically be transferred to the new.
- ☐ SKIP LESSON 8. This module was designed for the initial switch from paper checks to eWIC. The information is no longer applicable to Iowa.

- ☐ SKIP LESSON 9. We should not be working in NDT.
- ☐ Issuing and reissuing benefits can be challenging for several reasons. Multiple reissuances, food package changes, and proration issues can be confusing and result in a family being issued the wrong food benefits. Some good Iowa resources to familiarize yourself with include:
 - ☐ WIC Portal → Training → Focus Resources
 - ☐ Food package and proration cheat sheets
 - ☐ Process for Tailoring Food Packages
 - ☐ Policy Guidance for Foster Care Situations
 - ☐ Tips for Reissuing Food Packages
 - ☐ Administrative Adjustments and Nutrition Tailoring (Policy 235.01)

Recertification of Pregnant Woman as Breastfeeding/Add Baby Appointment

CO. TRAIN Course ID: 1057168

- ☐ The Expected DOB is not a required screen within the enrollment pop-up. However, it is very important that this information be completed.
 - ☐ Focus uses this date to calculate prematurity. Without an Expected DOB, an infant will automatically be assigned a calculated gestation of 40 weeks and premature growth charts (if appropriate) will not appear.
 - ☐ This date must be the same as the Expected Due Date in mom's pregnancy record. If the dates differ, Focus won't let you certify the infant.
 - ☐ The Expected DOB will likely be more accurate/recent than the EDD. If the two dates do not match, update the pregnancy tab as this would be older information.
- ☐ When recertifying a pregnant woman as post-partum, the termination reason selected will be "New Application Required." The Effective Date will automatically populate to 15 days in the future. Remember to manually change this to the current date.
- ☐ Use the acronym T.A.P. to remember the steps to take to change participant type
 - ☐ T = Terminate
 - ☐ A = Application
 - ☐ P = Participant Category
- ☐ In the example, a bank statement is used as proof of address. Remember, this is not acceptable in Iowa.
- ☐ If a woman is on WIC during her pregnancy, she should not need to be reissued a new card. This module has information about setting up a new card, but this would only be done for a new participant or a family whose card was lost or stolen.
- ☐ If a woman had already received benefits for the current month during her pregnancy, you may need to reissue for the current month (depending on her food package)
- ☐ Not all WIC agencies in Iowa use the Breastfeeding Equipment screen. Certain factors, such as using a rental company or having a limited number of pumps for a large service area, may have impacted the functionality of this screen for your agency. Check with your supervisor for more information about issuing breastfeeding equipment.

High Risk Follow-up Appointment

December 2017

CO. TRAIN Course ID: 1057169

- ☐ In Iowa, it is required that High Risk participants meet with a licensed dietitian at least once during a certification period (policy 240.55).
- ☐ Member types in Iowa include the term Parent/Guardian, instead of Endorser.

Mid-Certification Appointment**CO. TRAIN Course ID: 1057171**

- ☐ In Iowa, a mid-certification appointment is referred to as a Health Update (Policy 215.75).
 - ☐ Infants should have a health update appointment completed every 3 months. Measurements must be taken during at least one of these appointments.
 - ☐ Children should be scheduled for a Health Update 6 months after their certification appointment.
- ☐ Risks should be determined at all Health Update Appointments, even if you do not believe that risks have changed since the certification appointment.
- ☐ Participants are not required to report income changes and staff is not required to ask. However, participants do have the responsibility to report changes (Policy 215.46).
- ☐ Infant food packages will auto-update at the 4 and 6 month milestones. However, it is important to verify that these food packages are correct.
- ☐ An exclusively BF infant will not automatically receive a food package at 6 months. The infant's status must be changed to Prim Excl/Comp. A new food package will need to be created and verified. The effective date will be the first day the infant is eligible to receive foods.

Other Compass Activities**CO. TRAIN Course ID: 1057170**

- ☐ Once a foster child is moved into their new record, be sure to mark "Make Foster Child" and the date on the Enrollment pop-up. They will now have a Foster indicator and will be counted as their own Economic Unit.
 - ☐ Foster children are counted as a household of 1.
 - ☐ Foster children have their own eWIC card.
- ☐ When transferring between Iowa WIC agencies, Focus will not give you a pop-up asking if you wish to perform a transfer. Instead, you will open the participant record, and see that many of the branches on the navigation tree are unavailable. Go to the Activity branch and proceed to follow the instructions on the module.
- ☐ Issuing violations is normally only done by the WIC Coordinator. If you are not the Coordinator, just be aware that participants who are not compliant with the Rights and Responsibilities of the WIC program do face consequences (Policy 225.80).
- ☐ A VOC form is required when a participant transfers to your agency from a different state. This form proves their eligibility. For information on handling VOCs in and out of Iowa, see policy 220.20.
- ☐ Whenever you encounter tricky, or unusual situations - ASK FOR HELP!